

New Hampshire Continua of Care APR HOPWA Financial Services Form for HMIS

This form is required by HUD for each **Head of Household** entering your project.

This form is for **PHP** and **STRMU** only.

- | | |
|---|--|
| <input type="checkbox"/> BOS PHP | <input type="checkbox"/> MCOC PHP |
| <input type="checkbox"/> BOS STRMU | <input type="checkbox"/> MCOC STRMU |
| <input type="checkbox"/> GNCOC STRMU | |

Use this form to collect information about financial services:

- at entry to determine if client is in need of financial services when they enter your project.
- when services are provided as a one-time transaction (i.e., start and end dates are the same).
- at least once every three (3) months for programs that provide ongoing services for consecutive months.

This data should then be added to HMIS using the ServicePoint software within three (3) days of client intake. Record the start and end dates of the services provided and the dollar amount.

Refer to the *2014 HUD HMIS Data Standards Version 5.1* on the NH-HMIS website at: www.nh-hmis.org for an explanation of the data elements in this form.

Note: The **Date Form Completed** should be the same as the date the check was issued for the service.

Case Manager's Name: _____ **Date Form Completed:** ___-___-_____

Client's Name: _____

Note: Ensure that the **Start Date** entered is not before the **official** entry date of the client into HMIS.

Financial Services		
<i>Use this table to record financial assistance that has been provided during project stay, or if an answer has changed since the last update. Record for the Head of Household who receives Financial Assistance from HOPWA through Short-Term Rent, Mortgage, Utility Assistance (STRMU).</i>		
Service Type	Date	Amount
<input type="checkbox"/> Rental Assistance- STRMU and PHP	__-__-_____	\$
<input type="checkbox"/> Security deposits – PHP only	__-__-_____	\$
<input type="checkbox"/> Utility deposits – PHP only	__-__-_____	\$
<input type="checkbox"/> Utility payments – STRMU and PHP	__-__-_____	\$
<input type="checkbox"/> Mortgage assistance --STRMU	__-__-_____	\$
Total Financial Assistance:		\$

When a client exits, be sure to do the following in ServicePoint from the **Service Transaction** tab:

- update the **End Date** of the assistance; especially watch for *Financial Services* that have been added quarterly
- change the **Need Status** to *Closed* for the Financial Service
- edit the **Outcome** of the need related to the Financial Service exit

You can find additional forms to add more services for a client on the HMIS website at www.nh-hmis.org.